

**VILLAGE OF WELLINGTON  
PURCHASING DEPARTMENT  
PURCHASING PROCEDURE MODIFICATION (PPM)**

**PPM # 2**

**Subject:** 1. Revised Protest Procedures  
2. Revised Field Purchase Order (FPO) Policy  
3. Revised Approval Levels/Thresholds

**Revision Date**  
January 1, 2017

**Effective Date**  
January 1, 2017

**Explanation of Current Policy:**

1. The Village's existing protest procedures policy found in Chapter 9 of the Village's Purchasing Manual states:  
"A prospective bidder, proposer, or offeror may submit a protest in writing to the Purchasing Manager challenging the terms, conditions, or specifications of a competitive solicitation, within three days (excluding Fridays, Saturdays, Sundays and legal holidays) after public posting or advertising of the competitive solicitation". Additionally "prior to the award of any contract, bidders, proposers, offerors, may submit a protest in writing to the Purchasing Manager. The protest must be filed within three days (excluding Fridays, Saturdays, Sundays, and legal holidays) after posting of the Notice of Intended Award for public viewing in Wellington's Clerk's Office. Within seven days (excluding Fridays, Saturdays, Sundays, and legal holidays) of receipt of the written protest, the Purchasing Manager shall attempt to settle or resolve the dispute, with or without a hearing and within his/her sole discretion".
2. The Village's existing Field Purchase Order (FPO) policy (Chapter 6 (A) states "FPO's properly executed are routed directly to Accounts Payable without any intervention by the Purchasing Department. Field purchase orders cannot be used for Capital Improvement Project (CIP) purchases".
3. The Village's existing approval level threshold (Page 6- Purchasing Manual) requires Department Manager, Purchasing Manager, Director of OFMB, Deputy Village Manager/Asst. Village Manager/ Senior Manager approval for purchases greater than \$10,000 but less than \$25,000.

**New Policy:**

1. "A prospective bidder, proposer, or offeror may submit a protest in writing to the Purchasing Manager challenging the terms, conditions, or specifications of a competitive solicitation, within three days (excluding, Saturdays, Sundays and legal holidays) after public posting or advertising of the competitive solicitation". Additionally "prior to the award of any contract, bidders, proposers, offerors, may submit a protest in writing to the Purchasing Manager. The protest must be filed within three days (excluding Saturdays, Sundays, and legal holidays) after posting of the Notice of Intended Award for public viewing in Wellington's Clerk's Office. Within seven days (excluding Saturdays, Sundays, and legal holidays) of receipt of the written protest, the Purchasing Manager shall attempt to settle or resolve the dispute, with or without a hearing and within his/her sole discretion".
2. "FPO's properly executed are routed directly to Accounts Payable without any intervention by the Purchasing Department. Field purchase orders **can** be used for Capital Improvement Project (CIP) purchases to pay for items less than or equal to \$2,500, that cannot be processed by the use of the Purchasing Card". Any such CIP purchase will still require approval from the Village Manager or designee.
3. Purchases greater than \$10,000 but less than \$25,000 require approval from Department Manager, Purchasing Manager, Director of OFMB, Assistant Village Manager **and the Village Manager** unless the Village Manager has provided for an acting Village Manager in his absence.

**Impact of Change in Policy:**

1. The existing protest procedures policy allows bidders, proposers, offerors the ability to protest the specifications or award of a bid within three days of posting the competitive solicitation, or after a notice of intended award has been posted, excluding Fridays, Saturdays, Sundays and legal holidays. The protest timeline excluded Fridays only because the Village was closed for business on such day. Due to the recent change in Village hours of operation (open on Fridays effective January 1, 2017), Fridays will no longer be excluded from the protest timeline. Effective January 1, 2017, all protests must occur within three days excluding Saturdays, Sundays, and Legal Holidays.
2. The new policy will allow the use of FPO's for Capital Improvement Purchases below \$2,500, where such purchase cannot be processed by use of a P-Card.
3. The new policy will require any purchases over \$10,000 but not more than \$25,000 be approved by the Village Manager.

Director of Purchasing

Director of Administrative and  
Financial Services

Village Manager

*EDB*  
*Samuel St. Pierre*  
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